



VRManager™

Manual

MAX Communication Server
Release 6.7

April 2012

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Contents

CHAPTER 1

Installing VRManager	1
Requirements	1
Pre-Setup	2
Installing VRManager Service	2
Fresh Install	2
Upgrade from Previous Version	3
Installing VRManager for a Client	4
Setting Access Privileges	4

CHAPTER 2

Using VRManager Admin	5
VRM Admin Window	5
User Page	5
Adding Users	6
Editing User Details	7
Changing the Admin Password	7
Pooling Page	7
Storage Page	8
Log Page	10
AltiWare ACC or ACM Page	11
Adding Servers	12
Changing the Centralized Recording Directory	13

CHAPTER 3

Using VRManager Client	15
VRM Client Main Window	15
Menu Bar	16
Quick Access Toolbar	16
File Menu	16
Saving Files	16
Export to File	17
Change Password	18
Edit Menu	18
Searching Voice Records	18

Playing Voice Records	19
Displaying Columns	20
Sorting	21
Media Player Option	21
Report Menu	21
Index	23

Installing VRManager

VRManager performs recorded file management — indexing, converting, tracking, playback, reporting, and other critical functions for call center customers who would like to keep recorded files for administrative, legal, or quality assurance purposes.

Requirements

Install VRManager on a *different system* than the one on which the MAXCS ACC/ACM server is installed.

If you are upgrading, you can upgrade from VRManager 5.2 and above only.

VRManager requires the following:

- VRManager License installed at the MAXCS ACC/ACM system. (You can verify the licenses when you run MaxAdministrator by selecting **License > License Information.**)
- MAX Communication Server (MAXCS) ACC/ACM (6.7 or higher)
- Pentium IV 2 GHz (minimum) CPU
- 40 GB available hard drive disk space
- 1 GB RAM
- IDE RAID 0-1 (minimum) hard drive
- NIC
- Microsoft Windows 2003 SP2, Windows 2008, or Windows 2008 R2
- Java 2 Runtime Environment (SE v1.4.2) (VRManager installation program will install this)
- MDAC (Microsoft Data Access Components) 2.8 or higher version
- Microsoft Internet Explorer 6.0 or later. A minimum installation is sufficient, and Internet Explorer does not have to be the default browser.

Pre-Setup

The SQL 2008 Express database is installed with the VRManager Setup program.

Before running Setup, please ensure the following.

- File and print sharing must be active on your operating system. To verify:
 1. In Control Panel, double-click **Network Connections**.
 2. On the Advanced menu, click **Advanced Settings**.
 3. On the **Adaptors and Bindings** page, ensure that **File and Print Sharing for Microsoft Networks** is selected.
- Make sure that **Silently succeed** is selected in the local security options named below.
 1. In Control Panel, double-click **Administrative Tools**.
 2. Double-click **Local Security Policy**.
 3. Expand **Local Policies**.
 4. Select **Security Options**.
 5. Ensure that the following option in the right pane is set to **Silently succeed** before installing:
 - ♦ On Windows 2003: **Devices: Unsigned driver installation behavior**.
- Problems can occur if you use a Terminal Services or Remote Desktop connection to attempt to install a new instance of SQL 2008 Express. If problems are encountered, restart the VRManager Setup program from the local computer without using Terminal Services or Remote Desktop.

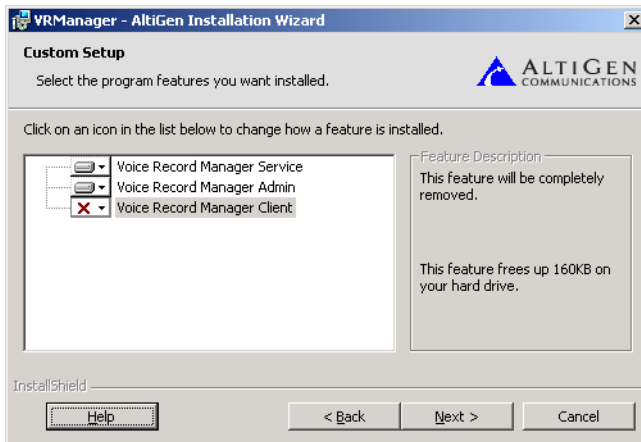
Installing VRManager Service

To install VRManager service, you will use one of two methods: **Fresh install** and **Upgrade from previous version**.

Fresh Install

If you do a fresh install, the installation program installs SQL 2008 Express and Jservice Loader on your system automatically.

1. Run the **Setup** program and follow the instructions as they appear on the screen.



2. In the Custom Setup screen, choose to install **Voice Record Manager Service** and **Voice Record Manager Admin**. If you plan to use VRM Client at this system, also select **Voice Record Manager Client**. Then click **Next**.

After installation, you can run VRManager Admin from **Start > Programs > VRManager > VRM Admin**.

Upgrade from Previous Version

To upgrade from VRManager 5.2 or above:

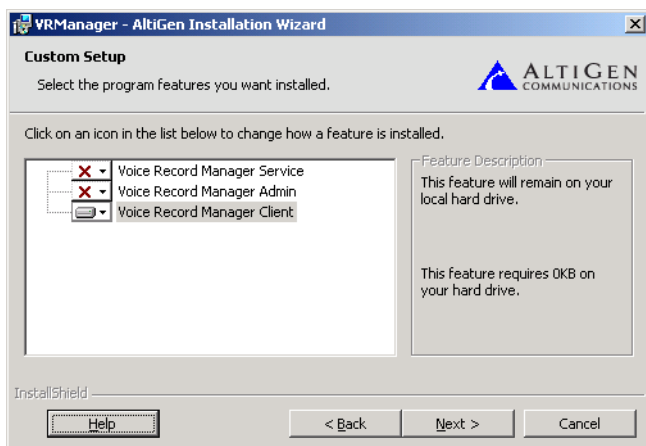
1. Stop the VRM service.
2. Run the **Setup** program.
3. Follow the installation instructions as they appear on the screen.

In the Custom Setup screen, choose to install **Voice Record Manager Service** and **Voice Record Manager Admin**. If you plan to use VRManager Client at this system, also select **Voice Record Manager Client**.

Installing VRManager for a Client

To install VRManager for a client system:

1. Run the **Setup** program and follow the instructions on the screen.



2. In the Custom Setup screen, choose to install **Voice Record Manager Client** or **Voice Record Manager Admin**.

If you install VR Admin on a client system, some **Browse** buttons will not appear.

After installation, you can run VRManager Client from **Start > Programs > VRManager > VRM Admin** or **VRM Client**.

Note: If VRManager is run behind a firewall, open TCP port 10040.
(VRManager may not work behind NAT.)

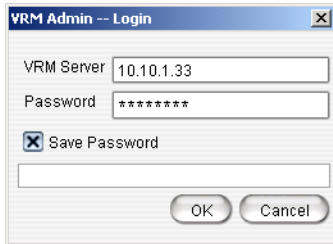
Setting Access Privileges

- The directory of centralized records in the MAXCS ACC/ACM server must be shared fully with the VRManager user. This user not only requires privilege to read/write to the shared folder, but also read/write to the local folder.
- The destination of the backup location must be valid and accessible in the local computer or remote computer. The user must have full privilege to read/write to the shared and local folders.
- In Windows 2003 Server, the default setting of the OS security is very robust, so caution should be used when setting users' access privileges.

Using VRManager Admin

To run VRManager Admin:

1. Choose **Start > Programs > VRManager > VRM Admin**.



2. Enter the **VRM Server** IP address or server name and **Password**. (The default password is 22222.)
3. Check the **Save Password** checkbox if you want VRM Admin to remember the password the next time the program runs.
4. Click **OK**.

Note: Each Windows user has his own VRM Admin login setting.

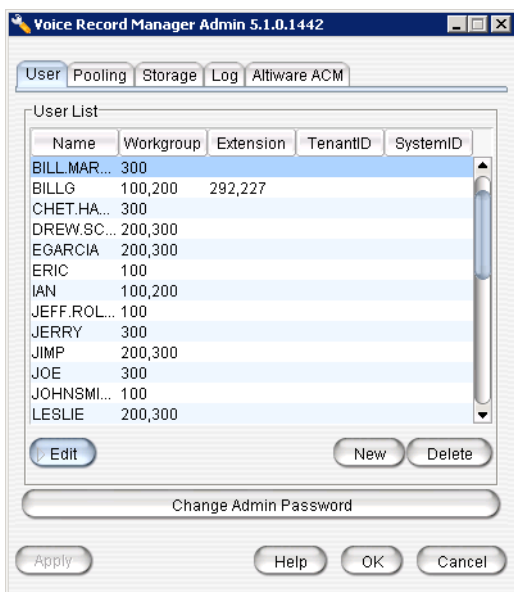
VRM Admin Window

VRM Admin has five configuration pages:

- User
- Pooling
- Storage
- Log
- AltWare ACC/ACM

User Page

The VRM **User** page shows the User List for VRManager clients and shows the workgroups, extensions, and systems that the user can query. From this page, an administrator can add, edit, and delete users; limit their queries to certain workgroups, extensions, and systems; change user passwords; and change the VRM Admin password.



Adding Users

To add a new VRManager Client user:

1. Click **New**.

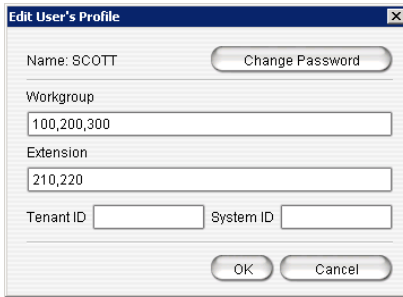
Enter a User Name, Password and Password Confirmation. (The account name is not case-sensitive.)

2. Click **OK**. The new user appears in the User List field.
3. To limit this user's queries to certain workgroups, extensions, and systems, select the new user and click **Edit**. Enter the workgroup numbers, the extension numbers, and system IDs. Separate entries with a comma. (To allow the user to query *all* workgroups or all extensions, leave those text boxes empty.)

Editing User Details

To edit a user:

1. Select the user on the User page and click **Edit**.



The 'Edit User's Profile' dialog box contains the following fields and buttons:

- Name: SCOTT
- Change Password button
- Workgroup: 100,200,300
- Extension: 210,220
- Tenant ID: [empty field]
- System ID: [empty field]
- OK button
- Cancel button

2. Make your changes, and click **OK**.

Changing the Admin Password

To change the VRM Admin password:

1. Click the **Change Admin Password** button.



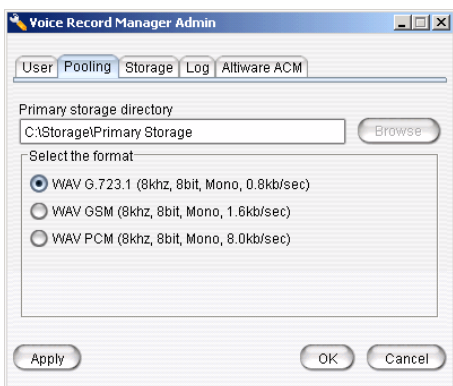
The 'Change Admin Password' dialog box contains the following fields and buttons:

- Old Password: [empty field]
- New Password: [empty field]
- Confirm Password: [empty field]
- OK button
- Cancel button

2. Enter the information in the Old Password, New Password and Confirm Password fields, and then click **OK**.

Pooling Page

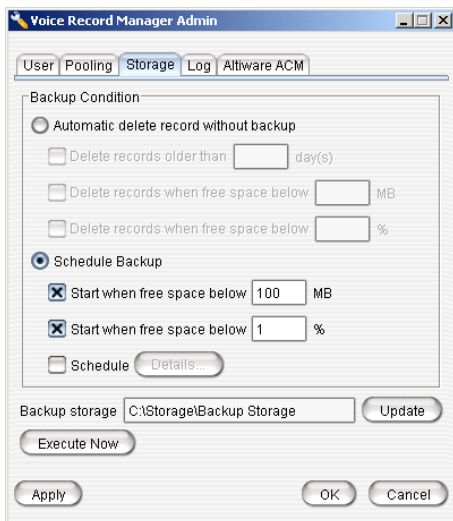
The pooling page lets you set the location of the primary storage directory. Click **Browse** to select the location. VRM Admin pools the newly recorded files from the MAXCS server, and saves them into the primary storage directory in the .wav format you select here (G.723.1, GSM, PCM).



Note: The **Browse** button is not available if VRM Admin is running on a different server than VRM Service.

Storage Page

On the **Storage** page you can set backup conditions for the storage of voice records.



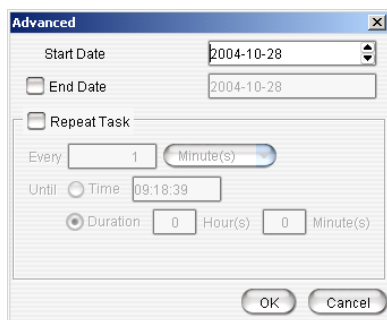
Select one of the following conditions:

- **Automatic delete record without backup** – VRM Admin will delete records without backing them up. To set additional automatic delete parameters, select any of the following options:
 - ▶ Delete records older than x day(s)
 - ▶ Delete records when free space below x MB
 - ▶ Delete records when free space below x %
- **Schedule Backup** – VRM Admin will automatically back up, then delete records. To specify backup parameters, select any of the following options:
 - ▶ Start when free space below x MB
 - ▶ Start when free space below x %

Schedule – For detailed settings, click **Details**. Use the drop-down list to select the **Schedule Task** (Daily/Weekly/Monthly), use the up/down arrows to select the **Start Time** and to define the **Daily Schedule** (every x days), **Weekly Schedule** (any day in every x weeks), or **Monthly Schedule** (any date in every month), then click **Apply**.

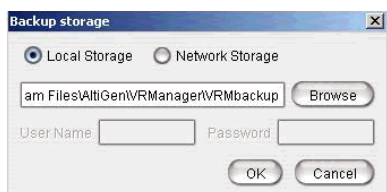
The screenshot shows a 'Details' dialog box with a title bar containing a close button. The main text area displays 'Daily: At 09:18:20 every day, starting 2004-10-28'. Below this is a section with two labels: 'Schedule Task' and 'Start Time'. Under 'Schedule Task' is a dropdown menu showing 'Daily Schedule'. Under 'Start Time' is a time selection control showing '09:18:20' and an 'Advanced' button. Below these is a 'Daily Schedule' section with a label 'Every' followed by a spinner box containing the number '1' and the text 'day(s)'. At the bottom of the dialog is a checkbox labeled 'Show multiple schedules' and two buttons: 'Apply' and 'Cancel'.

Use the **Advanced** button to set a Start Date and End Date; or check the **Repeat Task** checkbox to set up parameters for a continuous schedule, then click **OK**.



Check the **Show multiple schedules** checkbox to display and set up more than one schedule. You can add new multiple schedules, then modify them.

- **Backup Storage** – Enter the location for the backup storage, or use **Update** to select a new location.



You can enter a local path or network path. The destination of the backup location must be valid and accessible in the local computer or remote computer. The user must have full privilege to read/write to the shared and local folders. Also, VRManager supports backup to DVD/RW; simply enter the path for the DVD/RW location.

Note: The **Browse** button is not available if VRM Admin is running on a different server than VRM Service.

- **Execute Now button** – Click this button will begin backup of records.

When you have finished setting backup parameters, click **Apply** or **OK**.

Log Page

A log file for the VRM server is created each day named “yyyymmdd.log” (for example, 20040404.log). A daily report for the VRM server is also created “yyyymmdd.rpt” (for example, 20040404.rpt). The Log window allows an administrator to set the directory paths for VRM log and report.

Note: The **Browse** buttons are not available if VRM Admin is running on a different server than VRM Service.

The screenshot shows the 'Voice Record Manager Admin' window with the 'Log' tab selected. The window has a title bar with standard Windows controls. Below the title bar are tabs for 'User', 'Pooling', 'Storage', 'Log', and 'Altware ACM'. The 'Log' tab contains the following settings:

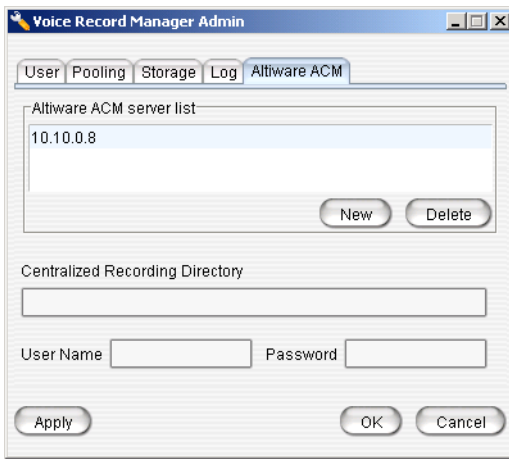
- Set Log Directory:** A text box containing 'C:\Program Files\Altigen\VRManager\logs' and a 'Browse' button.
- Delete the log files older than:** A checked checkbox followed by a text box containing '60' and the label 'day(s)'.
- Set daily report directory:** A text box containing 'C:\Program Files\Altigen\VRManager\reports' and a 'Browse' button.
- Delete the report files older than:** A checked checkbox followed by a text box containing '60' and the label 'day(s)'.
- Send daily report by mail:** An unchecked checkbox followed by 'Mail Configuration' and 'Test' buttons.
- When there is a warning or error:** Two radio buttons, 'When there is a warning or error' (selected) and 'Always'.
- Buttons:** 'Apply', 'OK', and 'Cancel' buttons at the bottom.

- **Set Log Directory** – Use **Browse** or enter a path to specify where you want log files to be saved; check the **Delete the log files older than x days** checkbox to delete archived log files.
- **Set Daily Report Directory** – Use **Browse** or enter a path to specify where you want daily report files to be saved; check the **Delete the log files older than x days** checkbox to delete archived daily report files.
- **Send daily report by mail** – VRM will send a report **When there is a warning or error** or **Always**. Use the **Mail Configuration** button to configure the recipient's email address. Click **Test** to send a test email.

Click **Apply** or **OK** when finished.

AltWare ACC or ACM Page

The **AltWare ACC** or **ACM** page displays the MAXCS ACC or ACM servers and centralized recording directories that VRManager will access. Here, administrators can add or delete MAXCS ACC/ACM servers, and specify the centralized recording directory for the specified MAXCS ACC/ACM server.



Adding Servers

To add a new MAXCS ACC/ACM server, do the following:

Add servers at the Altiserv system

1. Make sure the Centralized Storage directory is located on the local drive on the Altiserv system.
2. Share the storage directory with Full Control to a domain user or local administrator.

Add servers at the VRM Server

1. In the **AltWare ACC** or **ACM** page of VRM Admin, click **New**.



2. Enter the MAXCS ACC or ACM Server IP Address, Centralized Recording Directory (the Share name of the centralized recording folder), User Name and Password. Then click **OK**. If the user account belongs to an NT domain, you must enter "NTDOMAIN;username" in

the User Name edit box. If the account is local Administrator, just enter administrator.

After adding a new server, VRM Service immediately checks the MAXCS server for the VRManager License.

The newly added server is displayed in the MAXCS ACC or ACM Server List field.

Note: VRManager starts converting all voice recording data as soon as the MAXCS ACC/ACM Server information is added to the MAXCS ACC or ACM Server List.

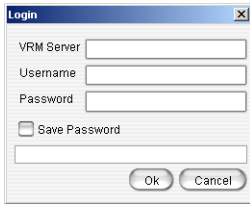
Changing the Centralized Recording Directory

To edit a MAXCS ACC/ACM server's location for the centralized recording directory, highlight the MAXCS ACC/ACM server in the server list, then input the new location in the **Centralized Recording Directory** field.

Using VRManager Client

To run VRManager Client:

1. Choose **Start > Programs > VRManager > VRM Client**.

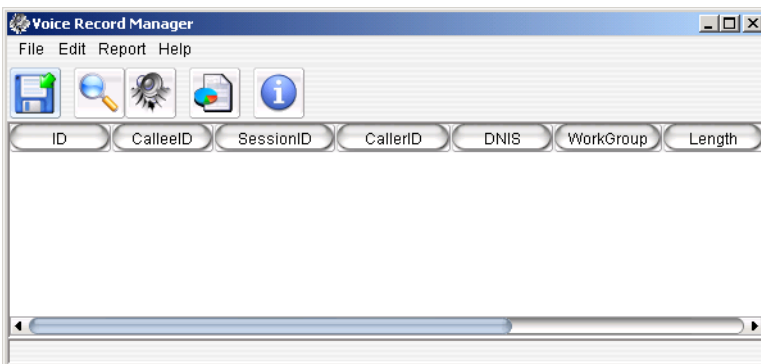


2. Enter the VRM Server IP address or server name, User name and Password.
3. Check the **Save Password** checkbox to have VRM Client remember the password the next time the program is run.
4. Click **OK**.

Note: Each Windows user has a unique VRM Client login setting.

VRM Client Main Window

When you start VRM Client, the first window you see is the VRM Client main window.



At the top is a menu bar, and below is a quick-access toolbar. At the bottom is a scroll bar for viewing the display columns.

Note: Each Windows user has a unique VRM Client display column in the main window.

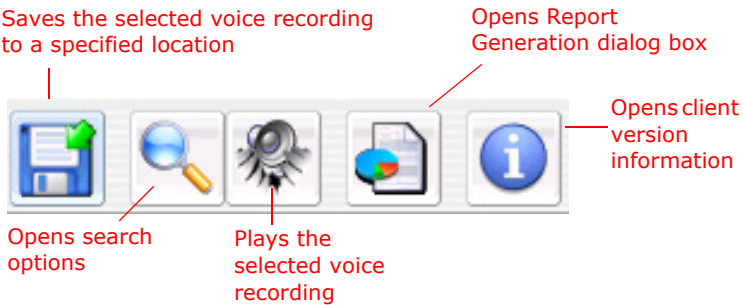
Menu Bar

Using the menus, you can perform the following functions:

- **File** – Save As, Export to File, Change Password, Exit
- **Edit** – Search, Play, Display Column, Option
- **Report** – Generate report
- **Help** – VRM Client version information

Quick Access Toolbar

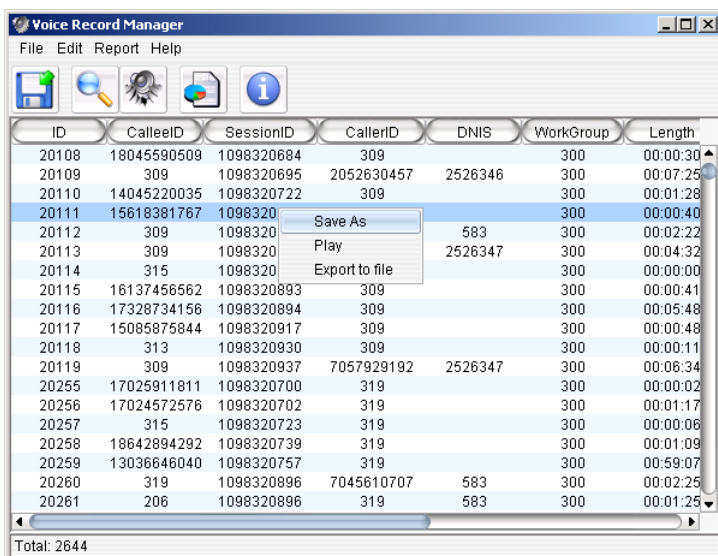
The toolbar contains buttons that are menu shortcuts.



File Menu

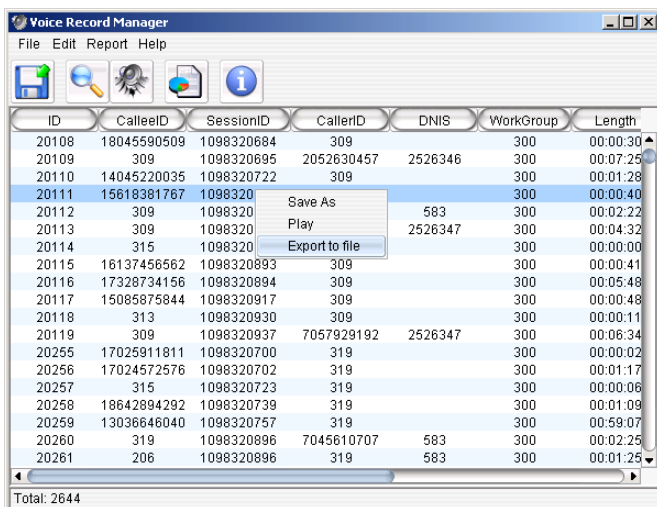
Saving Files

To save a file, click a voice record in the main window to highlight it, and click the **Save As** button. Or, right-click a voice record and select **Save As**.



Export to File

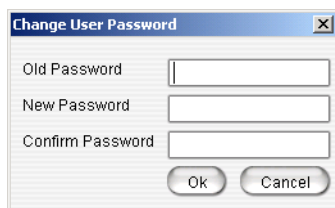
To export search results to a tab-separated text file (.txt), choose **File > Export To File** from the main menu, or right-click the search results list and choose **Export To File**.



Change Password

To change your password:

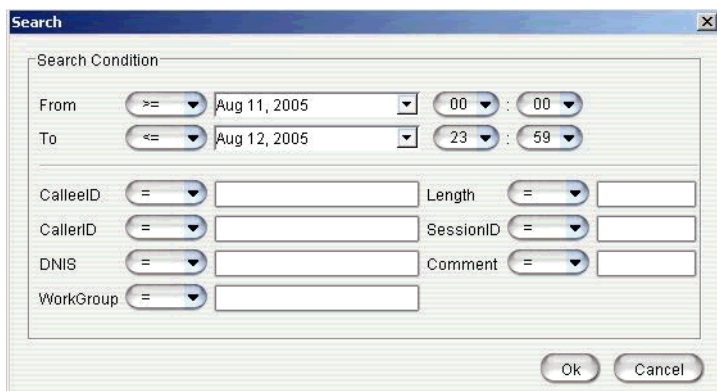
1. Choose **File > Change Password** from the main menu.
2. Enter the necessary information in the Old Password, New Password and Confirm Password fields, then click **OK**. The new password applies at the next log in.



Edit Menu

Searching Voice Records

To search voice records, choose **Edit > Search** or click **Search** in the toolbar. You can search based on the following conditions:



The relational symbols for each condition include:

- = (equal)
- < (greater than)
- > (less than)
- >= (less than or equal to)
- <= (greater than or equal to)
- <> (not equal)

like (look for sub-string)

btwn (between)

in—searches the results in sets; for example, CallerID “In” “101 AND 102” means CallerID equals 101 or CallerID equals 102.

Notes

- The date/time format is the same as the system format of the operating system.
- Typing “OR” in upper case in the edit box means “or.”
- Typing “AND” in upper case in the edit box means “and.”
- To leave out a condition, leave the edit box empty.
- Only the Comment column will be editable directly from the main view window.

Searching for *All* an Extension’s Voice Records

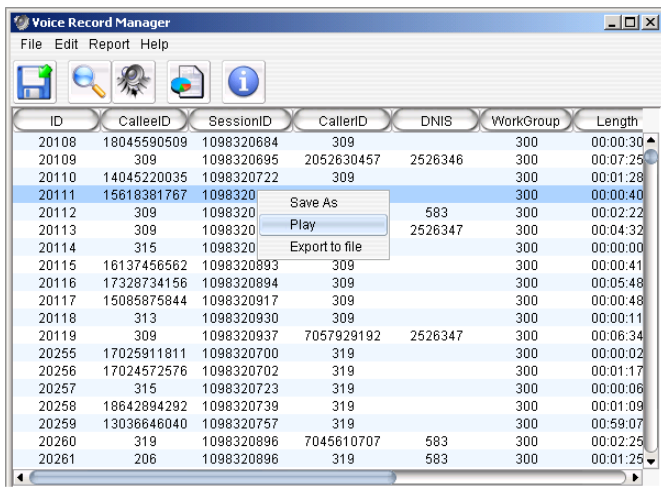
If you query a specified extension’s voice records and in that query you also specify a workgroup, the query results show only the extension’s voice records related to the workgroup. The results do not show non-workgroup voice records.

If you want the query results to display *all* voice records for that extension, leave the WorkGroup field blank.

Playing Voice Records

To play a voice record,

Click a voice record in the main window to highlight it, and then click the **Play** button.



Note: Deleted voice files do not play.

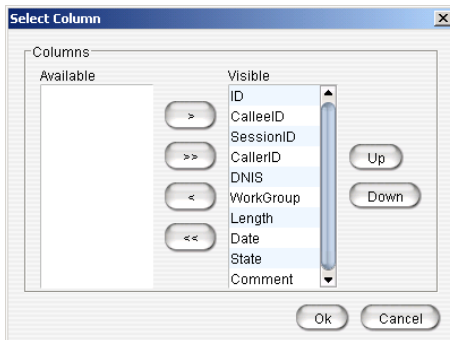
Displaying Columns

You can select which columns you want displayed in the main view window. These are the column headers you can select from:

- ID
- Callee ID
- Session ID
- Caller ID
- DNIS
- Workgroup
- Length
- Date
- State – There are three states that a record file can be in:
 - ▶ Delete: In this state, a record cannot be played or saved.
 - ▶ Backup: In this state, you must manually put the right backup media in the path if you back up the record and remove it.
 - ▶ Normal: In this state, the file can be played or saved.
- Comment

To select columns for display,

1. Choose **Edit > Select Column**. The fields in the Visible list appear as columns under the VRM toolbar.



2. Use the arrow keys (< or >) to move a field from one list to the other. You can use the << or >> buttons to move the entire group of fields from one list to the other.
3. Click **OK**.

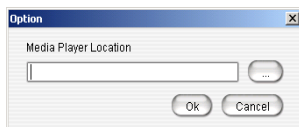
Sorting

In the main view window, you can click on a specific column heading to sort records in ascending or descending order on that field. You can use the scroll bar at the bottom of the window to view all the displayed columns.

Media Player Option

VRM client plays the selected file using a media player defined by the user.

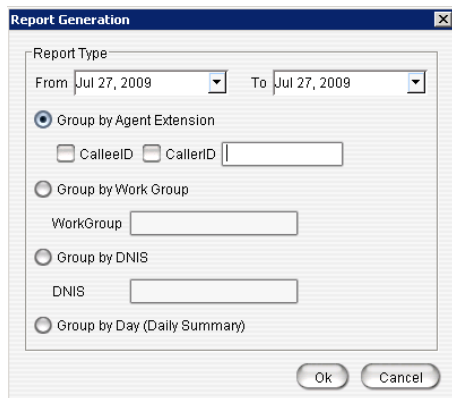
If the media player is not defined, VRManager does not play the file, and instead opens a dialog box so you can assign a media player. You can also select the media player by choosing **Edit > Option**. In the dialog box, select the Media Player Location by typing the path in the field or using the browse button (...), then click **OK**.



Report Menu

You can generate reports based on agent, workgroup, DNIS or date. To generate a report,

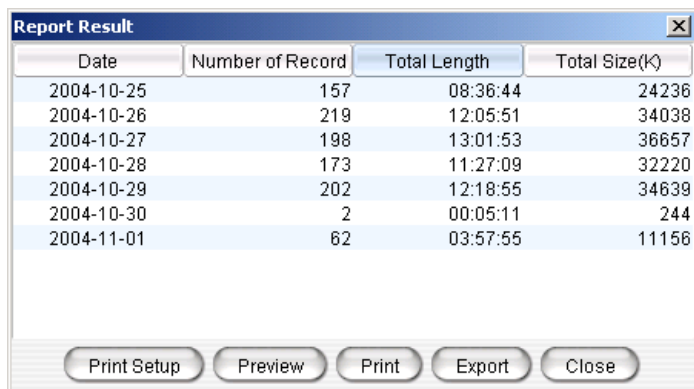
1. Choose **Report** from the main menu or click the **Report** button.



The 'Report Generation' dialog box contains the following elements:

- Report Type**: A label above two date pickers.
- From**: A date picker set to 'Jul 27, 2009'.
- To**: A date picker set to 'Jul 27, 2009'.
- Group by Agent Extension**: A radio button that is selected. Below it are two checkboxes: ☐ CalleeID and ☐ CallerID, followed by a text input field.
- Group by Work Group**: A radio button. Below it is a text input field labeled 'WorkGroup'.
- Group by DNIS**: A radio button. Below it is a text input field labeled 'DNIS'.
- Group by Day (Daily Summary)**: A radio button.
- Buttons**: 'Ok' and 'Cancel' buttons at the bottom right.

2. Click the Down arrow to select From and To dates from a calendar.
3. Select one of the following format options and click **OK**.
 - ▶ **Group by Agent Extension** – Select Callee ID or Caller ID, or both, and enter the agent's extension in the field.
 - ▶ **Group by Workgroup** – Enter the workgroup number in the Workgroup field.
 - ▶ **Group by DNIS** – Enter the DNIS number in the DNIS field.
 - ▶ **Group by Day (Daily Summary)** – Formats the report based on date period summary for each day.
4. A window show the selected parameters. From there, select **Print Setup**, **Preview**, **Print**, or **Export** (as a tab-separated text file).



The 'Report Result' window displays a table with the following data:

Date	Number of Record	Total Length	Total Size(K)
2004-10-25	157	08:36:44	24236
2004-10-26	219	12:05:51	34038
2004-10-27	198	13:01:53	36657
2004-10-28	173	11:27:09	32220
2004-10-29	202	12:18:55	34639
2004-10-30	2	00:05:11	244
2004-11-01	62	03:57:55	11156

At the bottom of the window are five buttons: 'Print Setup', 'Preview', 'Print', 'Export', and 'Close'.

Index

A

- adding
 - client users 6
 - servers 12
- admin password, changing 7
- AltiWare ACM page 11
- automatic delete record without backup 9

B

- backup 4, 10
 - location 4, 10
 - schedule 9
 - storage 10

C

- centralized recording directory, changing 13
- changing
 - admin password 7
 - centralized recording directory 13
 - client password 18
- client users, adding 6
- column display 20

D

- deleting records 9
- displaying columns 20

E

- Execute Now button 10
- export to file 17

F

- firewall, running VRManager behind 4

I

- installing VRManager 1

L

- license, VRManager 2
- log file, configuring 10
- login, VRM Client 15

M

- media player, assigning 21

N

- NAT and VRManager 4

P

- password
 - changing admin 7
 - changing client 18
- playing voice records 19
- privileges 4

R

- records
 - playing 19
 - searching 18
 - sorting 21
- reports, generating 21
- requirements, VRManager 1

S

- saving files 16
- schedule backup 9
- search symbols 18
- searching voice records 18
- servers, adding 12
- sorting records 21
- storage
 - backup 10
 - directory, setting 7

T

toolbar 16

V

voice records

 playing 19

 searching 18

VRM Admin

 AltiWare ACM page 11

 log page 10

 pooling page 7

 storage page 8

 user page 5

VRM Client

 edit menu 18

 file menu 16

 generating reports 21

 login 15

VRManager

 installing 1

 license 2